

**POSITION DESCRIPTION**

DOA-15302 (C07/2015)  
PREVIOUSLY OSER-DMRS-10  
State of Wisconsin  
Department of Administration/Division of Personnel Management

**Rvsd 3/27/19**

1. Position No. <b>314588</b>		2. <b>Cert</b> / Reclass Request No. <b>19-8162</b> Effective:	3. Agency No. <b>566</b>
4. NAME OF EMPLOYEE	5. DEPARTMENT, UNIT, WORK ADDRESS Wisconsin Department of Revenue Research & Policy Division Sales & Property Tax Policy Team 2135 Rimrock Road Madison, WI 53714		
6. CLASSIFICATION TITLE OF POSITION <b>Revenue Economist-Confidential</b>			
7. CLASS TITLE OPTION (to be filled out by Human Resources Office)	8. NAME AND CLASS OF FORMER INCUMBENT Travis Arthur, Rev Economist-Confidential-Senior		
9. AGENCY WORKING TITLE OF POSITION	10. NAME AND CLASS OF EMPLOYEES PERFORMING SIMILAR DUTIES Zach Petersen, Rev Economist-Confidential		
11. NAME AND CLASS OF FIRST-LINE SUPERVISOR <b>Jamie Adams</b> <b>Revenue Administrative Manager</b>	12. FROM APPROXIMATELY WHAT DATE HAS THE EMPLOYEE PERFORMED THE WORK DESCRIBED BELOW?		
13. DOES THIS POSITION SUPERVISE SUBORDINATE EMPLOYEES IN PERMANENT POSITIONS? Yes [ ] No [ X ] IF YES, COMPLETE AND ATTACH A SUPERVISORY POSITION ANALYSIS FORM			

14. POSITION SUMMARY – PLEASE DESCRIBE BELOW THE MAJOR GOALS OF THIS POSITION:

**SEE ATTACHED**

15. DESCRIBE THE GOALS AND WORKER ACTIVITIES OF THIS POSITION

- GOALS: Describe the major achievements, outputs, or results. List them in descending order of importance.
- WORKER ACTIVITIES: Under each goal, list the worker activities performed to meet that goal.
- TIME %: Include for goals and major worker activities.

TIME %

GOALS AND WORKER ACTIVITIES

(Continue on attached sheets)

**SEE ATTACHED**

16. SUPERVISORY SECTION - TO BE COMPLETED BY THE FIRST LINE SUPERVISOR OF THIS POSITION

- a. The supervision, direction, and review given to the work of this position is [X] close [ ] limited [ ] general.
- b. The statements and time estimates above and on attachments accurately describe the work assigned to the position.

Signature of first-line supervisor \_\_\_\_\_ Date \_\_\_\_\_

17. EMPLOYEE SECTION - TO BE COMPLETED BY THE INCUMBENT OF THIS POSITION

I have read and understand that the statements and time estimates above and on attachments are a description of the functions assigned my position.

Signature of employee \_\_\_\_\_ Date \_\_\_\_\_

18. Signature of Human Resources Manager \_\_\_\_\_ Date \_\_\_\_\_

POSITION SUMMARY (Line 14)

Revenue Economist-Confidential positions provide econometric, policy, and fiscal analysis to the Governor, the Legislature, and the public on state tax policy, state and local finance matters, and the Wisconsin economic outlook. These positions provide revenue estimates, economic forecasts estimates of the fiscal effect of existing and proposed tax, state aid, and tax relief efforts, develop recommendations on legislative proposals; identify policy options; prepare budget and policy issue analyses, and produce research reports on Wisconsin's state and local taxes. The revenue and fiscal estimates created by these positions are used in the development of the Governor's budget bill and provide guidance to the Legislative Fiscal Bureau for revenue estimates released by that office.

Entry level positions do most work on their own, but they also do some assistive/collaborative work with more senior analysts. Assignments are on a mostly short term basis with some long term projects.

Positions at this level are obtaining and developing a base/scope/depth of relevant knowledge of:

1) tax and tax relief policy issues; 2) the state's economy; 3) the legislative history of tax and tax relief issues; 4) Department of Revenue (DOR) specific databases and data sources – including knowledge of how to access, utilize, and evaluate DOR data; 5) data sources outside the department (including those developed by other state agencies, federal government agencies, and private firms and non-profit organizations); 6) state statutes, federal law, department administrative rules, and agency practices and 7) the division's work products, existing methodologies, and communications.

This position will begin to develop working relationships with appropriate professional positions both internal and external to the department on policy, fiscal, and technical matters. The information developed by this position will be utilized in providing econometric, policy, and fiscal analysis to the Governor, Legislative Services Agencies, and the public on state tax policy and state and local finance matters. This position may interact with a range of employees such as top management officials, internal DOR employees, and others external to DOR. Based upon business needs, this position will coordinate work groups on issue development; provide solutions and direct negotiations on complex issues; and provide training and consultation to junior analysts.

This position will conduct research & analysis in the areas of state taxation with a major focus on:

- Both general and segregated fund excise taxes (including cigarette, tobacco products, liquor, beer, and motor fuel taxes).
- Regulation of alcoholic beverages, and related issues.
- Tax and finance ranking responsibilities include both state and local government and both revenues and expenditures.
- Sales tax including certain product-based exemptions.

This position will work under **close progressing to limited** supervision. Under close supervision, work is performed according to detailed instructions and that supervision is available on short notice. Work is reviewed for accuracy and completeness. Under limited supervision, the incumbent proceeds on his or her own initiative while complying with policies, practices and procedures prescribed by the supervisor. The supervisor generally answers questions only on the more important phases of the work. Work is reviewed daily to weekly. Final product is closely reviewed by supervisor or higher level RE-Conf positions for completeness and accuracy.

**Basic** proficiency level. **Minimal** latitude for taking initiative and using independent judgement. Work is checked frequently. **Entry** level competency where the position is still developing and obtaining a base/scope/depth of relevant knowledge.

TIME % GOALS AND WORKER ACTIVITIES (Line 15)

- 45% A. State Tax Policy Analysis: Research and policy analysis in the areas of excise taxes, regulation of alcoholic beverages, sales tax exemptions, and other subjects.
- A1. Policy and statistical analysis, and bill analysis of excise taxes (including excise taxes on cigarettes, tobacco products, liquor, wine, beer and motor fuels) and alcohol regulation issues, and sales tax exemptions.
- A2. Analysis of state impacts of federal proposals, court decisions, and national and/or multistate agreements, including the tobacco Manufacturers Settlement Agreement.

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- A3. Development of methodologies and databases for quantitative analysis of assigned tax issues, including partnership income tax returns.
- A4. Draft responses to inquiries about taxation including preparation of replies to correspondence from the Governor and Secretary of Revenue.
- A5. Analysis of regional variations in tax collections.
- A6. Quantification and analysis of the revenue impact of Internet commerce and analysis of nexus standards and nexus policy options.
- A7. Interact with a range of employees such as top management officials, internal DOR employees, and others external to DOR as needed.
- A8. Participate in work groups on issue development; provide solutions and direct negotiations on complex issues.

35% B. Analysis of Legislative Proposals.

- B1. Analysis of legislation affecting excise taxes and alcohol regulation issues, (including excise taxes on cigarettes, tobacco products, liquor, wine, beer and motor fuels) and sales tax exemptions.
- B2. Preparation of fiscal estimates, hearing documents, technical memos, and other analyses of introduced legislation.
- B3. Development of tax policy options as requested -- including analysis of state and local fiscal implications and alternatives.
- B4. Determine how to productively use off-peak periods in the legislative/budget cycle.

10% C. Research and Analysis. Research into state taxation and assigned major focus areas, including the impact of emerging technologies and industry structure.

- C1. Research into Wisconsin's sales tax structure, including additions and subtractions to the sales tax base and the sales and use tax chapter of the Summary of Tax Exemption Devices.
- C2. Development of methodologies and databases for quantitative analysis of state taxation and assigned major focus areas.
- C3. Prepare issues papers and supporting fiscal analysis of in the areas of state taxation and assigned major focus areas.

10% D. Performance of Miscellaneous Assignments.

- D1. Conduct special research projects as assigned, including staffing of task forces and similar study groups and drafting of reports for those groups.
- D2. Modify databases and quantitative approaches for changes in the information technology environments of data sources both internal and external to the department.
- D3. Participate in the department's change management activities and in other departmental teams, as assigned.
- D4. Assist with planning and carrying out successive steps and resolves problems and deviations in accordance with instructions, policies, and accepted practices.
- D5. Perform other duties and tasks, as assigned.

KNOWLEDGES, SKILLS AND ABILITIES

1. Basic knowledge of excise taxes, sales taxes, and tax rankings.
2. Develop knowledge of economics, policy analysis or agricultural economics, including the principles of public finance.
3. Develop knowledge of principles of tax and tax relief policy issues and administration.
4. Develop knowledge of methods of policy/fiscal analysis and research, including statistical or econometric methods, and methods of data collection and analysis.
5. Knowledge of computer modeling techniques.
6. Develop knowledge of state tax laws, regulations, and the legislative process.
7. Develop knowledge of department procedures relating to the analysis of legislative proposals, including preparation of fiscal notes.
8. Develop knowledge of department procedures relating to preparation of responses to letters and other inquiries.
9. Word processing and spreadsheet software skills and abilities.
10. Statistical and database software skills and abilities.
11. Well-developed written and verbal communication skills, including the ability to comprehend and summarize complex policy issues and documents.
12. Basic knowledge of the state's economy.
13. Develop knowledge of the legislative history of tax and tax relief issues.
14. Skill in DOR specific databases and data sources – including knowledge of how to access, utilize, and evaluate DOR data.
15. Ability to access, utilize, and evaluate DOR data, as well as data sources outside the department (including those developed by other state agencies, federal government agencies, and private firms and non-profit organizations).
16. Develop knowledge of state statutes, federal law, department administrative rules, and agency practices.
17. Develop knowledge of the division's work products, existing methodologies, and communications.
18. Develop knowledge of economic forecasts.
19. Ability to develop recommendations on whether bills should be vetoed or signed.
20. Ability to develop and work on major work products with little to no specific direction or review.
21. Ability to develop necessary data sources, databases and information sources.
22. Ability to answer questions, or provide assistance related to econometric, policy, and fiscal analysis issues.
23. Ability to develop working relationships with appropriate professional positions both internal and external to the department on policy, fiscal, and technical matters.
24. Ability to communicate with internal and external entities to promote understanding of the economist's analysis.



### Confidential Exclusion Analysis (Non-Supervisory Positions)

This analysis should be completed by the position's supervisor and reviewed by the agency human resources representative prior to classifying a position as "confidential." The information will be used to assist in determining if the position is performing confidential duties which support inclusion of the position in a confidential classification, resulting in exclusion of the position from bargaining unit representation.

Wisconsin Statute s. 111.81(7) excludes from the definition of employee for collective bargaining purposes "individuals who are privy to confidential matters affecting the employer-employee relationship..." Under s. 111.825(3), Wis. Stats., the Wisconsin Employment Relations Commission (WERC) assigns eligible employees to the appropriate statutory bargaining unit and ultimately determines appropriateness of confidential exclusions. Through case decisions, the WERC has developed the following criteria to determine if an individual should be excluded on the basis of being confidential. The criteria should be used to determine if a position may appropriately be classified as confidential.

#### Position Identification Data

1. Name of Employee (if filled):
2. Civil Service Classification: **Revenue Economist-Confidential**
3. Department and Division: **Revenue; Division of Research & Policy**
4. Bureau, Section, and Unit (or comparable): **Sales & Property Tax Policy Team**
5. Name and Classification of Supervisor: **Jamie Adams, Rev Admin Mgr; R&P Deputy Administrator**
6. Name and Complete Civil Service Title of Former Incumbent (if any):

#### **Zachary Petersen, Revenue Economist-Confidential**

7. Does the position have access to, knowledge of, or participate in matters which deal with: [If the answer is "Yes", please list the corresponding position description (PD) task statement(s) next to the response below.]

*Positions perform research and analysis functions related to the various taxes and programs administered by the DOR, including but not limited to individual income, corporate income, sales, excise, utility and property taxes, as well as the Homestead credit, earned income credit, shared revenue and lottery credit. They also perform economic research and forecasting for the national and Wisconsin economies. Positions assist in the preparation of budget requests pertaining to tax and tax relief policy; provide analysis and guidance to advise and assist both the Executive and Legislative branches of state government in the development and implementation of tax policy and tax relief efforts; provide General Purpose Revenue forecasts, and provide policy and fiscal analysis of proposed legislation and current law.*

		YES	NO	PD Task #s
7a	the employer's strategy or position in collective bargaining		X	
7b	contract administration, which may include grievance settlements or interpretation of contractual language?		X	
7c	information being gathered in preparation for litigation of labor relations issues?		X	
7d	other similar matters pertaining to labor relations and grievance handling between the bargaining unit representative and the employer?	X		A2, A5, A7, A8, B2, B3
8	Is the information the position has access to available to the bargaining representative or its agents		X	
9.	Are there other confidential employees available to perform the confidential tasks?		X	

For a position to be confidential, a "yes" answer is required in at least one of the questions listed under number seven (7a through 7d), and a "no" answer is required in both questions eight and nine. If the answer to question number nine is "yes", then the possibility of consolidating confidential tasks should be discussed with the agency's management.

A signature below means the position has been reviewed and you have concluded it should be confidential as defined by s. 111.81(7)(a), Wis. Stats.

Supervisor \_\_\_\_\_ Date \_\_\_\_\_  
Jamie Adams

Human Resources Representative \_\_\_\_\_ Date \_\_\_\_\_  
Linda S. Weber